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ABSTRACT

This report provides a comprehensive look at the external environment impacting Los Rios Community College District (LRCCD) (California). It summarizes the social, economic, and political changes at the state and national levels, in general, and in the Sacramento-Yolo Consolidated Metropolitan Statistical Area (CMSA) served by LRCCD, more specifically, that are shaping the future for the District. The 1999 Environmental Scan includes the following sections: (1) Changing Demography; (2) Changing Economy and Employment Picture; (3) Other Local Higher Education Providers; (4) Changing Political Scene; (5) Projected Changes for Los Rios Community College District; and (6) Summary Observations of External Scan. Long term employment growth over the last 15-year period has been strong across all sectors except farming, mining, and government. While the total population in the Greater Sacramento CMSA is projected to increase slightly more than 20%, the number of high school graduates are projected to increase by almost 34%. Community and business representatives identified several key issues of concern during a 1997 Strategic Planning process: addressing educational challenges resulting from welfare reform; developing an identity as a networked system of colleges rather than as individual colleges; promoting better awareness of the colleges' comprehensive, low-cost and high quality offerings. Contains 34 charts. (JA)

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Los Rios Community College District
Office of Institutional Research

1999 Environmental Scan of the Greater Sacramento Area

September 1999

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ED 449 831

This is the second in a series of reports that provide a comprehensive look at the external environment impacting Los Rios Community College District (LRCCD). It summarizes the social, economic and political changes at the state and national levels, in general, and in the Sacramento-Yolo Consolidated Metropolitan Statistical Area (CMSA) served by LRCCD, more specifically, that are shaping the future for the District. In addition, this report projects total enrollment into the next millennium at the district level and for each Los Rios college – American River College (ARC), Cosumnes River College (CRC) and Sacramento City College (SCC).

The *1999 Environmental Scan of the Greater Sacramento Area* also serves as a companion piece to the *1999 Environmental Scan Report Card*, a much more comprehensive *internal* overview that describes the District's student population and how effectively it is being served by the District and its colleges. Together, these two documents provide important information about the changing forces effecting LRCCD now and as it moves into the 21st century. By monitoring these changes, the District will be in a better position to plan a direction that will best serve its students and Greater Sacramento.

Some data used for the analysis in this report are available at the Sacramento-Yolo CMSA level. Served by the three Los Rios colleges, the CMSA includes El Dorado, Placer, Sacramento and Yolo counties and will often be referred to as Greater Sacramento. Other data are only available at the primary Sacramento Metropolitan Statistical Area (MSA) level and will be referred to as Sacramento MSA. This area includes El Dorado, Placer and Sacramento counties only.

This external scan was originally completed in June 1999 and was updated with new data that became available in August 1999. As such, some of the charts vary slightly from the summary charts included in the July 1999 Key Issues for Planning Report which serves as an executive summary of both the internal and external scans.

The 1999 Environmental Scan of Greater Sacramento includes the following sections:

- Changing Demography –
  - General Population
  - School-Age Population and Their Academic Performance
  - Special Population Groups
- Changing Economy and Employment Picture
- Other Local Higher Educational Providers: A Market Analysis *(to be issued as a special report later this year)*
- Changing Political Scene
- Projected Changes for Los Rios Community College District –
- Summary Observations of External Scan

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Our Changing Demography -- General Population

Total Population: Changes through 1999

Chart 1
Population Changes in Greater Sacramento, California and the U.S. : 1981 through 1999

	1980 Census	1981	1990 Census	1998	1999	1-Year % Change: 1998 to 1999	18-Year % Change: 1981 to 1999
El Dorado County	85,812	87,900	125,995	148,800	150,800	1.3	71.6
Placer County	117,247	120,700	172,796	219,400	225,900	3.0	87.2
Sacramento County	783,381	797,000	1,041,219	1,156,500	1,177,800	1.8	47.8
Yolo County	113,374	114,500	141,210	155,500	158,800	2.1	38.7
Sacramento-Yolo CMSA	1,099,814	1,120,100	1,481,220	1,680,200	1,713,300	2.0	53.0
California	23,668,562	24,039,000	29,758,213	33,226,000	33,773,000	1.6	40.5
U.S.	226,546,000	228,446,000	248,765,000	269,067,000	271,626,000	1.0	18.9

Technical Notes:
Population figures represent January 1 estimates; census year population represents April 1 figures.

Sources:
U. S. Bureau of the Census; California Department of Finance.

With a 1999 population of 1.71 million, Greater Sacramento is among the fastest growing metropolitan areas, not only in California but in the entire U.S., posting a 53% increase in population between 1981 and 1999, well above the state's 40.5% and the nation's 18.9% increases.

Since the 1990 Census, Greater Sacramento has grown by 15.7% vs. the state's 13.5% and the nation's 9.2%. Placer and El Dorado counties led the CMSA with growth of 30.7% and 19.7%, respectively.

Total Population: Changes to the Year 2030

Chart 2
Population Changes in Greater Sacramento, California and the U.S. : to 2030

	1999[1]	2010	2020	2030	Projected Percent Change to 2010	Projected Percent Change to 2020	Projected Percent Change to 2030
El Dorado County	150,800	215,155	256,119	295,345	42.7	69.8	95.9
Placer County	225,900	325,648	391,245	456,644	44.2	73.2	102.1
Sacramento County	1,177,800	1,436,286	1,651,765	1,884,210	21.9	40.2	60.0
Yolo County	158,800	194,977	225,321	260,082	22.8	41.9	63.8
Sacramento-Yolo CMSA	1,713,300	2,172,066	2,524,450	2,896,281	26.8	47.3	69.0
California	33,773,000	39,957,616	45,448,627	51,868,655	18.3	34.6	53.6
U.S.	271,626,000	297,716,000	322,742,000	346,899,000	9.6	18.8	27.7

Technical Notes:
Note: Base year for CA and counties is 1990; base year for U.S. is 1994.
1 Actual population estimates for 1999.

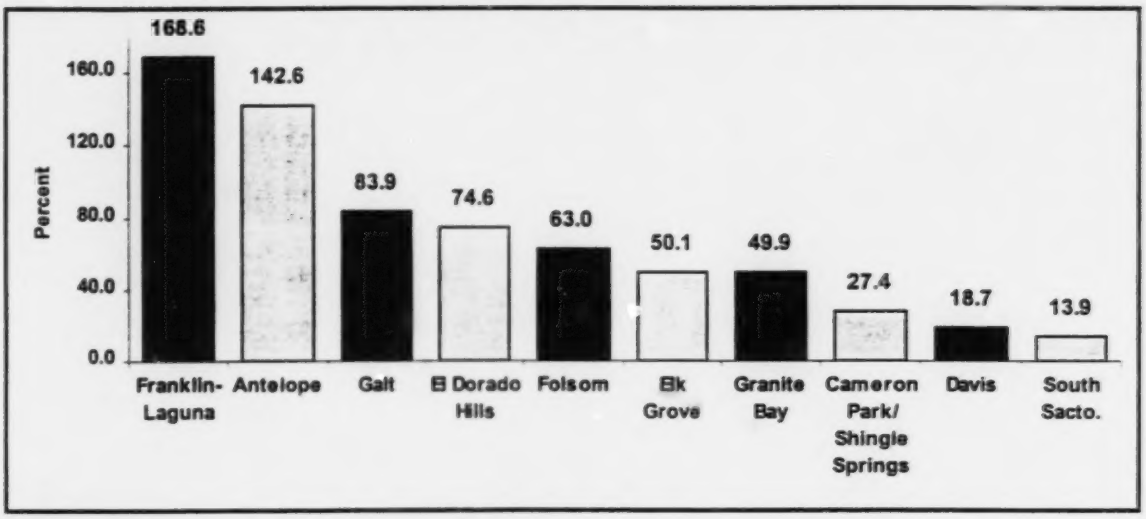
Sources:
U. S. Bureau of the Census; California Department of Finance.

According to projections by the California Department of Finance, total population in Greater Sacramento is projected to grow by 26.8% between 1999 and 2010. This compares to projected state growth of 18.3% and the nation's 9.6%.

By the year 2030, Greater Sacramento is expected to grow by 69% over its 1999 levels, compared with the state's 53.6% and the nation's 27.7%.

Community Level Population: Changes through 1999

Chart 3
Communities in Greater Sacramento with Largest Rate of Population Change: 1990 to 1999



Technical Notes:
Data represent SACOG Regional Analysis Districts (RADs), rather than the sometimes smaller city proper.

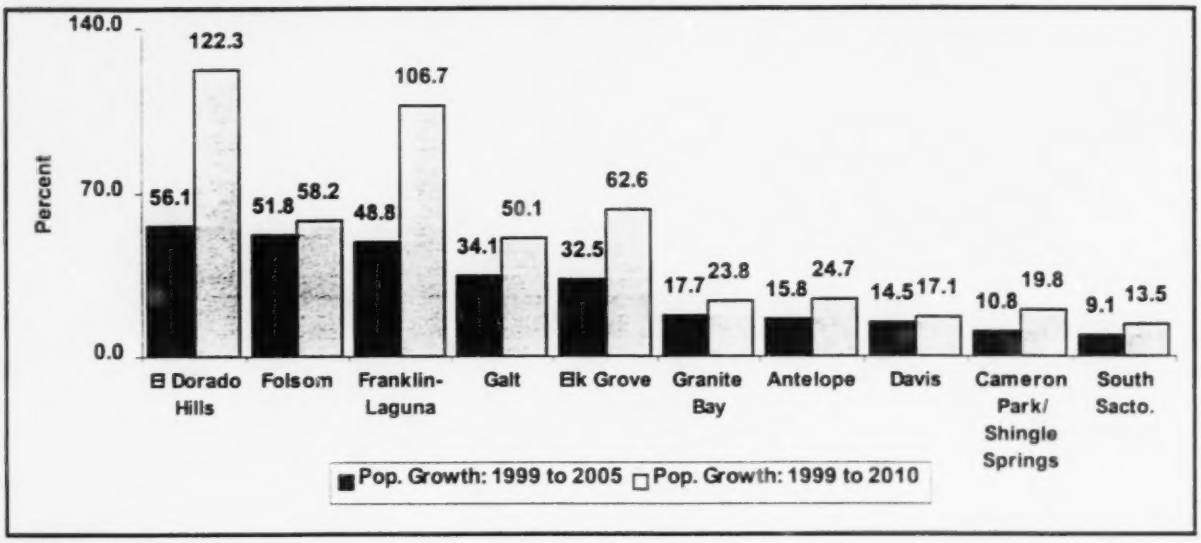
Sources:
Sacramento Area Council of Governments (SACOG), population estimates for Regional Analysis Districts.

Between the 1990 census and 1999, several large and small communities located in the Sacramento-Yolo CMSA that are served by the three Los Rios colleges experienced dramatic growth in their population and are displayed in Chart 3. Leading the way was Franklin-Laguna with growth to a 1999 population of 39,909, followed by: Antelope (1999 pop. of 29,648); Galt (1999 pop. of 18,972); El Dorado Hills (1999 pop. of 18,454); Folsom (1999 pop. of 48,250); Elk Grove (1999 pop. of 33,800); Granite Bay (1999 pop. of 19,207); Cameron Park/Shingle Springs (1999 pop. of 26,283); Davis (1999 pop. of 64,100); and South Sacramento (1999 pop. of 150,056).

There are four other growing communities in the Sacramento-Yolo CMSA served primarily by two other community college districts, whose residents attend Los Rios colleges, due to close geographic proximity. Communities served primarily by Sierra Community College District which posted strong growth are Rocklin (72.3% growth to 31,884) and Roseville (56.9% growth to 73,064) and Lincoln (18.3% growth to 11,850). A community served primarily by Yuba Community College District, posting strong growth was Woodland (13.8% growth to 48,446).

Community Level Population: Changes to the Year 2010

Chart 4
Communities in Greater Sacramento Projected to See Large Rates of Population Change: 1999 through 2010



Technical Notes:
Data represent SACOG Regional Analysis Districts (RADs), rather than the sometimes smaller city proper.

Sources:
Sacramento Area Council of Governments (SACOG), population estimates for Regional Analysis Districts.

Chart 4 shows that *all* of the communities that saw high growth between 1990 and 1999 are expected to continue growing through 2005 and 2010. Folsom and El Dorado Hills lead the way as the two highest-growth communities through 2005.

Growth through 2010 continues in El Dorado Hills and is also quite strong in the Franklin-Laguna area, while it is expected to be more moderate in Folsom. As Folsom Lake Center expands to become a college, it will be in a good position to absorb new students from the growing communities of Folsom, El Dorado Hills, Cameron Park - Shingle Springs and Granite Bay.

Community Level Population: Changes to the Year 2010

Chart 5
Communities in Greater Sacramento that Did Not Grow during the 1990s, But Are Projected to Grow: 1999 through 2010

Community	1999	2005	2010	% Population Growth: 1999 to 2005	% Population Growth: 1999 to 2010
North Natomas	664	13,809	24,720	1,979.7	3,622.9
West Sacramento	30,692	39,152	46,843	27.6	52.6
South Natomas	37,705	46,149	55,327	22.4	46.7

Technical Notes:
Data represent SACOG Regional Analysis Districts (RADs), rather than the sometimes smaller city proper.

Sources:
Sacramento Area Council of Governments (SACOG), population estimates for Regional Analysis Districts.

Chart 5 shows the three communities served by Los Rios colleges that grew very little from 1990 through 1999, but are expected to grow dramatically from 1999 forward.

All of the 13 high-growth communities of Greater Sacramento with growth displayed on Charts 4 and 5 are areas from which Los Rios colleges should expect to experience enrollment growth. American River College is likely to see strong enrollment growth from the Natomas areas of Sacramento and more moderate enrollment growth from Antelope. Sacramento City College is likely to see enrollment growth from West Sacramento and South Sacramento, and Cosumnes River College is likely to see continued enrollment growth from Franklin-Laguna, Elk Grove and Galt.

Soon-to-be Folsom Lake College should expect enrollment growth from the City of Folsom and from El Dorado Hills, Cameron Park - Shingle Springs and Granite Bay, all in close proximity to the now existing Folsom Lake Center.

Changes in the Ethnic Composition of the Total Population

Chart 6
Proportions of the Population by Ethnicity in Greater Sacramento and California: 1996

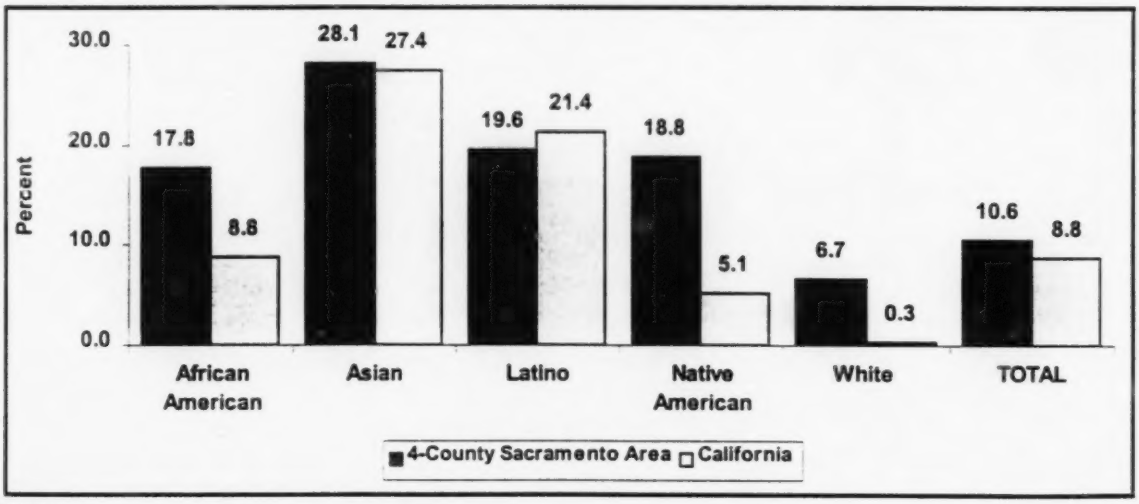
	El Dorado County	Placer County	Sacramento County	Yolo County	Greater Sacramento	California
African American	0.5	0.7	9.8	2.2	7.1	7.0
Asian	2.1	2.4	10.5	9.1	8.6	10.7
Latino	8.0	8.6	12.7	21.4	12.6	28.8
Native American	1.0	0.8	1.0	1.2	1.0	0.6
White	88.4	87.5	66.0	66.1	70.7	52.9

Source:
Department of Finance, *Race/Ethnicity Population Estimates, 7/90-7/96*, January, 1998.

In 1996, 7.1% of the Greater Sacramento population was African American, 8.6% was Asian/Pacific Islander, 12.6% was Latino (however 21.4% of Yolo County was), 1.0% was Native American and 70.7% was white. This compares with the state's 7.0% African American population, 10.7% Asian/Pacific Islander population, 28.8% Latino population, 0.6% Native American population and 52.9% white population.

The ethnic composition of California's population has changed dramatically over the last decade. Likewise, the ethnic composition of Greater Sacramento is also evolving, although the proportion comprised by ethnic minorities is smaller than is the case statewide. In 1990 whites made up 73.4% of the four-county Sacramento-Yolo CMSA, dropping to 70.7% by 1996; California's 57.4% white population as a proportion of the statewide total in 1990 dropped to 52.9% by 1996.

Chart 7
Growth Rates in Population by Ethnicity from 1990 to 1996: Greater Sacramento and California

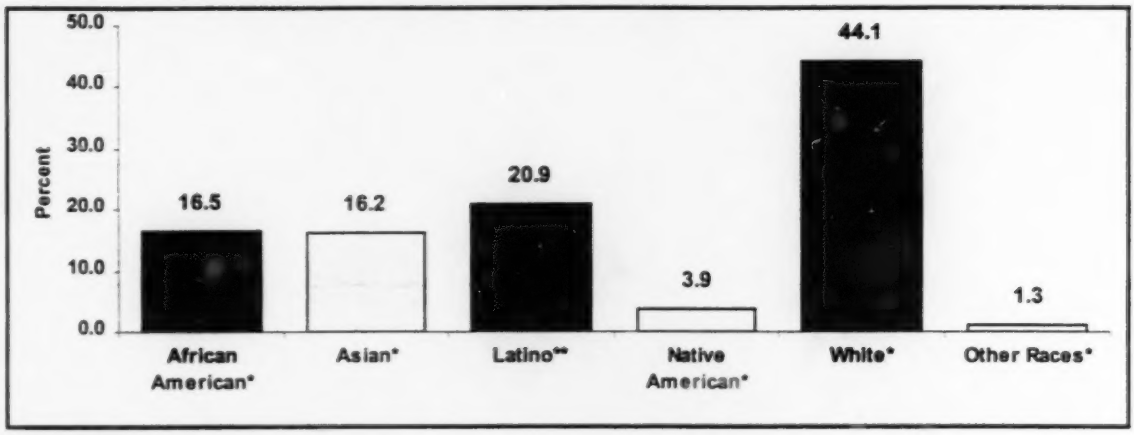


Source:
Department of Finance, *Race/Ethnicity Population Estimates, 7/90-7/96*, January, 1998.

Although the statewide population is more ethnically diverse than Greater Sacramento's, the area's rate of growth in specific ethnic groups from 1990 to 1996 is similar to that of the state's, as pointed out above in Chart 7. The exceptions are in the higher rates of growth in the African American and Native American populations in Greater Sacramento, although Native Americans are a rather small proportion of the overall population.

Changes in the Ethnic Composition of the Total Population

Chart 8
Proportions of the City of Sacramento Population by Ethnicity: April 1998



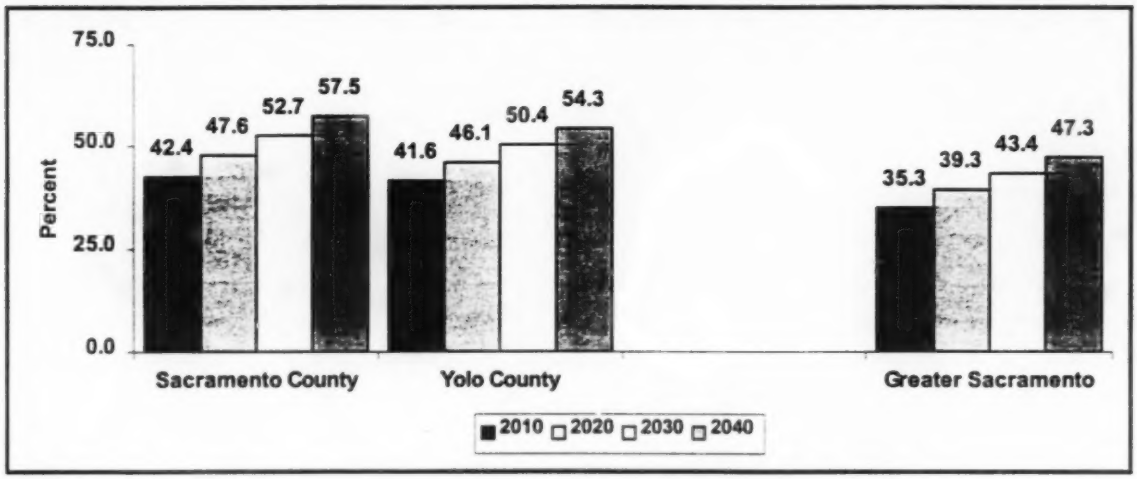
Technical Notes:
* This race and mixed race thereof.
** This category overlaps others.

Sources:
U.S. Bureau of the Census, *Dress Rehearsal: Census 2000* data.

In April 1998 Sacramento was one of three sites across the U.S. for the Census 2000 dress rehearsal providing much more recent information about the ethnic composition of the city. Results (displayed above) show that the city of Sacramento's ethnic composition is evolving more rapidly than expected. According to this new census data, white (includes mixed-white) population has already dropped to less than half of the total population.

Changes in the Ethnic Composition of the Total Population

Chart 9
Non-White Population as a Proportion of Total Population in the Sacramento-Yolo CMSA: Projections for 2010-2040



Source:
CA Dept. of Finance, *County Population Projections with Age, Sex and Race/Ethnic Detail*, December 1998.

This trend toward a more ethnically diverse population is projected to continue over the next ten years and beyond, not just for the city of Sacramento, but for Greater Sacramento, in general. Chart 9 displays the changing population projections for the four-county area of Greater Sacramento. Almost half of the population in the four-county area will be non-white by 2040, while more than half in both Sacramento and Yolo counties will be by 2030. Together, Sacramento and Yolo counties account for 78.0% of the CMSA population.

By 2030, 19.5% of Sacramento County residents will be of Latino origin and 19.5% will be Asian, as well; 13% will be African American and 1.1%, Native American. A larger proportion of Yolo County residents will be Latino (32.1%), while 14.9% will be Asian, 2.6%, African American and 1.4% Native American. Both El Dorado and Placer counties are projected to have low proportions of non-white residents (only 18% for each, by 2030).

Our Changing Demography -- School Age Population

School Age Population: Changes through 1998-99

Chart 10
School Enrollment in Greater Sacramento and California: 1994-95 through 1998-99

	1994-95	1995-96	1996-97	1997-98	1998-99	1-Year Percent Change: 1997-98 to 1998-99	4-Year Percent Change: 1994-95 to 1998-99
El Dorado County	28,422	28,632	29,084	29,006	28,864	-0.5	1.6
Placer County	42,527	44,246	46,797	49,102	52,306	6.5	23.0
Sacramento County	190,085	195,258	200,477	205,000	209,598	2.2	10.3
Yolo County	24,524	25,107	25,932	26,442	26,946	1.9	9.9
Sacramento-Yolo CMSA	285,558	293,243	302,290	309,550	317,714	2.6	11.3
CALIFORNIA	5,341,025	5,467,224	5,612,965	5,727,303	5,844,111	2.0	9.4

Sources:
CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment*.

Total enrollment in Greater Sacramento schools continues to grow. From the 1994-95 to the 1998-99 academic year, enrollment grew by 11.3% vs. a slightly lower statewide enrollment growth of 9.4%. Enrollment growth was strongest in Placer County (by 23.0%), followed by Sacramento County (by 10.3%), Yolo County (by 9.9%) and El Dorado County (by 1.6%).

One-year changes between the 1997-98 and the 1998-99 Academic Year show that enrollment was relatively unchanged in El Dorado County (down by 0.5%) but up slightly in Sacramento (2.2%) and Yolo (1.9%) counties. Placer County saw the largest one-year gain at 6.5%.

School-Age Population: Projected Changes to the 2007-2008 Academic Year

Chart 11
Public School Enrollment in Greater Sacramento and California: from 1998-99 to 2007-08

	1998-99[1]	2001-02	2003-04	2005-06	2007-08	Projected Percent Change from 1998-99 to 2003-04	Projected Percent Change from 1998-99 to 2007-08
El Dorado County	28,864	28,176	27,951	28,338	29,157	-3.2	1.0
Placer County	52,306	56,092	58,853	61,722	64,469	12.5	23.3
Sacramento County	209,598	214,955	217,545	220,992	224,693	3.8	7.2
Yolo County	26,946	27,497	27,802	28,213	28,621	3.2	6.2
Sacramento-Yolo CMSA	317,714	326,720	332,151	339,265	346,940	4.5	9.2
California	5,844,111	5,926,102	6,003,365	6,097,271	6,180,921	2.7	5.8

Technical Notes:
1 Actual public school enrollment for 1998-99.

Sources:
State of CA Dept. of Finance -- *CA Public K-12 Projections by County*, 1998 Series; CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment*, August 1999.

Public school enrollment in Greater Sacramento will continue to increase over the next decade at a much higher rate (9.2% by 2007-08) than it will statewide (5.8% by 2007-08). Placer County schools will lead the way with growth of 12.5% from 1998-99 to 2003-04 and by 23.3% four years later. Enrollment growth will continue to be stagnant in El Dorado County schools, increasing by only 1.0% in 2007-08 from 1998-99 levels. By 2007-08, enrollment growth in Sacramento and Yolo counties is projected to be 7.2% and 6.2%, respectively.

Ethic Composition of the School-Age Population in the 1998-99 Academic Year

Chart 12
Public School Enrollment by Ethnicity in Greater Sacramento and California: 1998-99

	African American	Native American	Asian	Latino	White	Multiple or No Response	Total
El Dorado County	326	480	835	2,896	24,283	44	28,864
Placer County	966	574	1,886	5,051	42,996	833	52,306
Sacramento County	32,298	2906	33,534	36,535	103,851	474	209,598
Yolo County	644	265	2,260	9,103	14,545	129	26,946
Sacramento-Yolo CMSA	34,234	4,225	38,515	53,585	185,675	1,480	317,714
California	507,506	50,029	648,511	2,412,059	2,210,494	15,512	5,844,111

Source:
CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment by Ethnicity*, August 1999.

Chart 13
Ethnic Proportions of Public School Enrollment by Ethnicity in Greater Sacramento and California: 1998-99

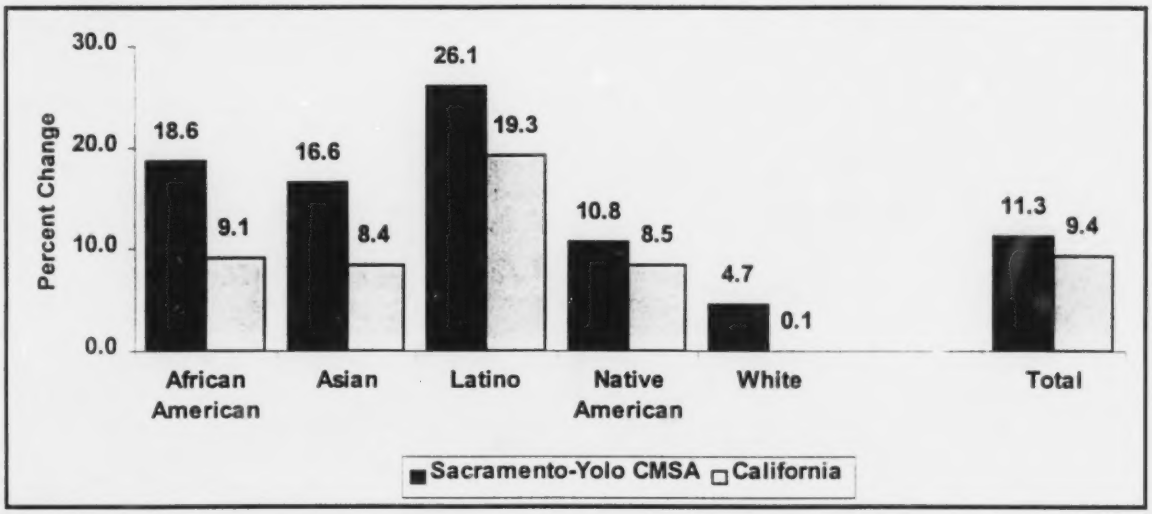
	African American	Native American	Asian	Latino	White	Multiple or No Response	Total
El Dorado County	1.1	1.7	2.9	10.0	84.1	0.2	100.0
Placer County	1.8	1.1	3.6	9.7	82.2	1.6	100.0
Sacramento County	15.4	1.4	16.0	17.4	49.5	0.2	100.0
Yolo County	2.4	1.0	8.4	33.8	54.0	0.5	100.0
Sacramento-Yolo CMSA	10.8	1.3	12.1	16.9	58.4	0.5	100.0
California	8.7	0.9	11.1	41.3	37.8	0.3	100.0

Source:
CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment by Ethnicity*, August 1999.

Enrollment by ethnicity in Greater Sacramento varies from enrollment across the state. Led by Sacramento County's 15.4% African American enrollment, the Sacramento-Yolo CMSA has a higher proportion than the state (10.8% vs. 8.7%). Conversely, the 41.3% statewide proportion of Latino students is much higher than Greater Sacramento's 16.9%, although Yolo County schools' enrollment of Latino students is 33.8%. Proportions of Asian and Native American students are almost the same in Greater Sacramento and the state. There are high proportions of white students in El Dorado County schools (84.1%) and Placer County schools (82.2%), while just under one-half of Sacramento County schools enrollment is white. Similarly, 54% of Yolo County schools' enrollment is white.

Ethnic Composition of the School-Age Population in the 1998-99 Academic Year

Chart 14
Growth Rates in School Enrollment by Ethnicity from the 1994-95 to the 1998-99 Academic Year: Greater Sacramento and California



Source:
CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment by Ethnicity*, August 1999.

Although the number of ethnic minority students as a proportion of all students is much higher on a statewide basis than it is in Greater Sacramento, enrollment of minority students is growing faster in Greater Sacramento schools. Between mid-1990 and the end of the decade, the growth rate of both Asian students and African American students in Greater Sacramento was approximately double that of growth statewide (16.6% vs. 8.4% for Asian students and 18.6% vs. 9.1% for African American students). The number of Latino students in Greater Sacramento schools grew by 26.1%, and by a lower 19.3% statewide. Growth in the number of Native American students enrolled in public schools is almost the same in Greater Sacramento and the state, at 10.8% and 8.5%, respectively. Growth in white student enrollment was stagnant, statewide, but grew by 4.7% in Greater Sacramento.

High School Graduates: Changes through the 1997-98 Academic Year

Chart 15
High School Graduates in Greater Sacramento and California: 1994 through 1998

	1994	1995	1996	1997	1998	1-Year Percent Change: 1997 to 1998	4-Year Percent Change: 1994 to 1998
El Dorado	1,318	1,392	1,427	1,543	1,721	11.5	30.6
Placer	1,947	2,231	2,420	2,655	2,873	8.2	47.6
Sacramento	8,525	8,464	8,508	9,288	9,946	7.1	16.7
Yolo	1,288	1,277	1,284	1,459	1,505	3.2	16.8
Sacramento-Yolo CMSA	13,078	13,364	13,639	14,945	16,045	7.4	22.7
California	253,083	255,200	259,071	269,071	282,897	5.1	11.8

Source:
CA Dept. of Ed. CBEDS data, *Public School High School Graduates*, 1994 through 1998.

The rate of growth in the number of high school graduates between 1994 and 1998 was much higher in Greater Sacramento (22.7%) than in the state as a whole (11.8%). The growth locally was led by high schools in Placer County where there was a 47.6% five-year increase, followed by growth of graduates from El Dorado County schools at 30.6%. Growth of graduates from Yolo and Sacramento county high schools was much the same at 16.8% and 16.7%, respectively.

However, the *annual* change in the number of high school graduates remained fairly flat until 1997, the first year that Tidal Wave II began moving into higher education. As pointed out in Chart 16 below, the growth has been much stronger in Greater Sacramento than it has been statewide. Yolo County High Schools led the way in 1997, with an annual growth of 13.6% from 1996, while El Dorado County high schools led the way with 11.5% growth one year later (from 1997 to 1998).

Chart 16
Annual Rate of Growth in the Number of High School Graduates in Greater Sacramento and California: 1995 through 1998

	1-Year % Change: 1995	1-Year % Change: 1996	1-Year % Change: 1997	1-Year % Change: 1998
El Dorado	5.6	2.5	8.1	11.5
Placer	14.6	8.5	9.7	8.2
Sacramento	-0.7	0.5	9.2	7.1
Yolo	-0.9	0.5	13.6	3.2
Sacramento-Yolo CMSA	2.2	2.1	9.6	7.4
California	0.8	1.5	3.9	5.1

Source:
CA Dept. of Ed. CBEDS data, *Public School High School Graduates*, 1994 through 1998.

High School Graduates: Changes to the Academic Year 2007-08

Chart 17
High School Graduates in Greater Sacramento and California: 1998 to 2008

	1998[1]	2002	2004	2006	2008	Projected Percent Change to 2004	Projected Percent Change to 2008
El Dorado County	1,721	1,870	1,826	1,900	1,888	6.1	9.7
Placer County	2,873	3,604	3,943	4,262	4,818	37.2	67.7
Sacramento County	9,946	11,204	11,595	11,983	12,791	16.6	28.6
Yolo County	1,505	1,641	1,719	1,884	1,909	14.2	26.8
Sacramento-Yolo CMSA	16,045	18,319	19,083	20,029	21,406	18.9	33.4
California	282,897	315,544	325,444	343,953	373,533	15.0	32.0

Technical Notes:
1 Actual number of high school graduates, 1998.

Sources:
State of CA Dept. of Finance – *CA Projected California Public High School Graduates by County by School Year*, 1998 Series; CA Dept. of Ed CBEDS data, *1998-99 CA Public High School Graduates*, August 1999.

Between 1998 and 2004, growth in the number of public high school graduates is projected to increase at a slightly higher rate in Greater Sacramento (18.9%) than it is statewide (15.0%). However, the gap narrows such that growth from 1998 to 2008 is almost the same for Greater Sacramento (33.4%) and the state (32.0%).

By 2008, Placer County leads the way with projected growth of 67.7%, followed by Sacramento County with projected growth of 28.6% and Yolo County with growth projected at 26.8%. For the high school class of 1998, 61.9% of all Greater Sacramento graduates were enrolled in Sacramento County schools.

Ethnic Composition of the 1998 High School Graduate Population

Chart 18
Public High School Graduates by Ethnicity in Greater Sacramento and California: 1997-98

	African American	Asian	Latino	Native American	White	Multiple or No Respone	Total
El Dorado County	23	44	102	43	1508	1	1,698
Placer County	39	116	255	23	2418	22	2,834
Sacramento County	1185	1,911	1203	128	5509	10	8,761
Yolo County	42	124	406	19	908	6	1,463
Sacramento-Yolo CMSA	1289	2195	1966	213	10343	39	14,756
California	21165	42711	87742	2513	128405	361	261,732

Source:
CA Dept. of Ed. CBEDS, *1998 High School Graduate Demographic Data Files*, June 1999.

Chart 19
Ethnic Proportions of Public High School Graduates by Ethnicity in Greater Sacramento and California: 1997-98

	African American	Asian	Latino	Native American	White	Multiple or No Respone	Total
El Dorado County	1.4	2.6	6.0	2.5	88.8	0.1	100.0
Placer County	1.4	4.1	9.0	0.8	85.3	0.8	100.0
Sacramento County	13.5	21.8	13.7	1.5	62.9	0.1	100.0
Yolo County	2.9	8.5	27.8	1.3	62.1	0.4	100.0
Sacramento-Yolo CMSA	8.7	14.9	13.3	1.4	70.1	0.3	100.0
California	8.1	16.3	33.5	1.0	49.1	0.1	100.0

Source:
CA Dept. of Ed. CBEDS, *1998 High School Graduate Demographic Data Files*, June 1999.

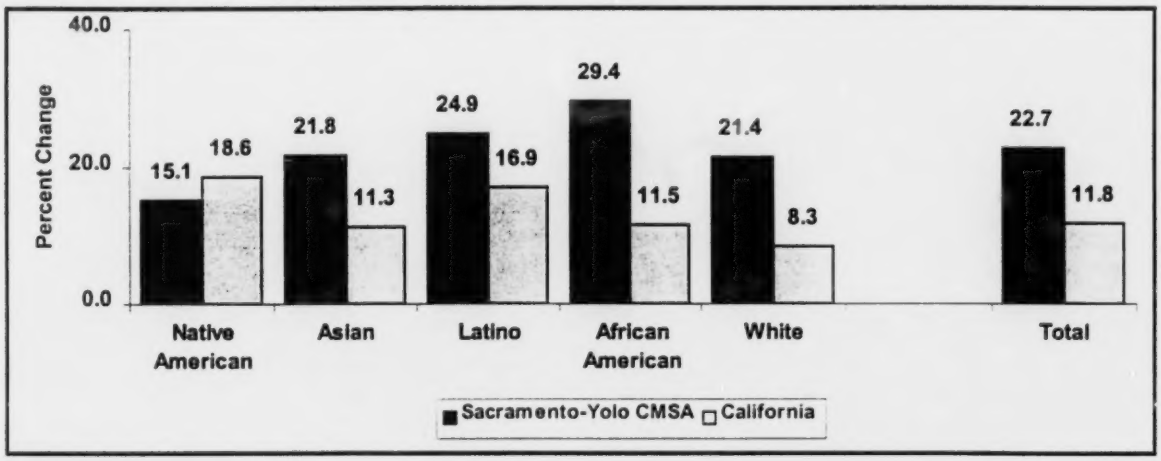
High school graduates of Greater Sacramento high schools are not quite as ethnically diverse as the students across all grade levels in 1997-98. Whereas only 58.4% of Greater Sacramento public school students enrolled in 1998-99 are white, 70.1% of 1998 high school graduates are white. At the state level, these figures are 37.8% and 49.1%, respectively.

In addition to the differences between Greater Sacramento and the state in the proportions of graduates who are white, there are also differences in the proportions of Latinos. Only 13.3% of Greater Sacramento's graduates were Latino, while 33.5% of the state's were.

As was the case with public school enrollment at the county level, Yolo County schools had more Latino graduates (27.8%) than the other three counties' schools, and Sacramento County schools had more African American graduates (13.5%). Likewise, high proportions of public high school graduates of El Dorado and Placer counties are white, at 88.8% and 85.3%, respectively.

Changes in the Ethnic Composition of the 1998 High School Graduate Population

Chart 20
Growth Rate in High School Graduates by Ethnicity in Greater Sacramento and California: 1994 to 1998



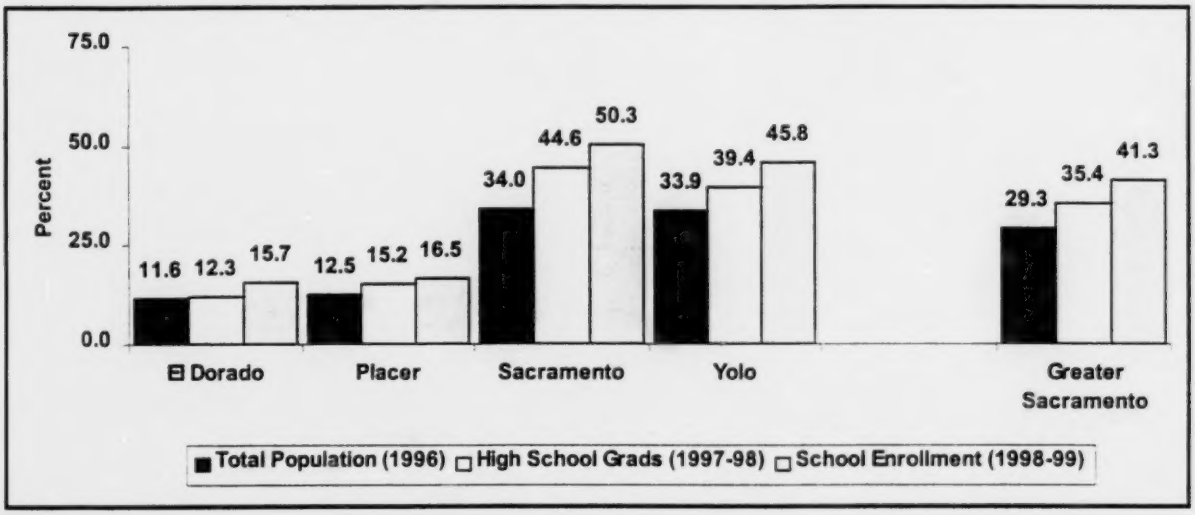
Source:
CA Dept. of Ed. CBEDS, *High School Graduate Demographic Data Files*, 1994 and 1998 graduates.

As was the case with public school enrollment, even though the number of ethnic minority graduates as a proportion of all graduates is much higher on a statewide basis than it is in Greater Sacramento, the rate of growth in local graduates (of almost all ethnic categories) is much larger. The number of graduates grew by 22.7% in Greater Sacramento between 1994 and 1998 and by 11.8%, statewide.

Locally, the largest rate of growth was in the number of African American graduates (by 29.4%), followed by Latino graduates (by 24.9%), Asian graduates (by 21.8%) and white graduates (by 21.4%). Statewide growth rates of Native American graduates was higher than Greater Sacramento's – 18.6% vs. 15.1%. In both cases, however, the total number of Native American graduates is quite small.

Changes in the Ethnic Composition: Total Population, Public School Enrollment and High School Graduates

Chart 21
Proportions of Total Population and K-12 School Population That Are Non-White in Greater Sacramento: 1996



Sources:
Department of Finance, *Race/Ethnicity Population Estimates, 7/90-7/96*, January, 1998; CA Dept. of Ed. CBEDS, *1998 High School Graduate Demographic Data Files*, June 1999; and CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment by Ethnicity*, August 1999.

In way of summary, data on the changing ethnicity of the population in Greater Sacramento suggest a growing school-age population that is far more ethnically diverse than the general population of Greater Sacramento. Whereas 29.3% of the 1996 population was non-white, 35.4% of high school graduates were in 1998. And K-12 enrollment is even more ethnically diverse: 41.3% of the student population was non-white (1998-99 academic year).

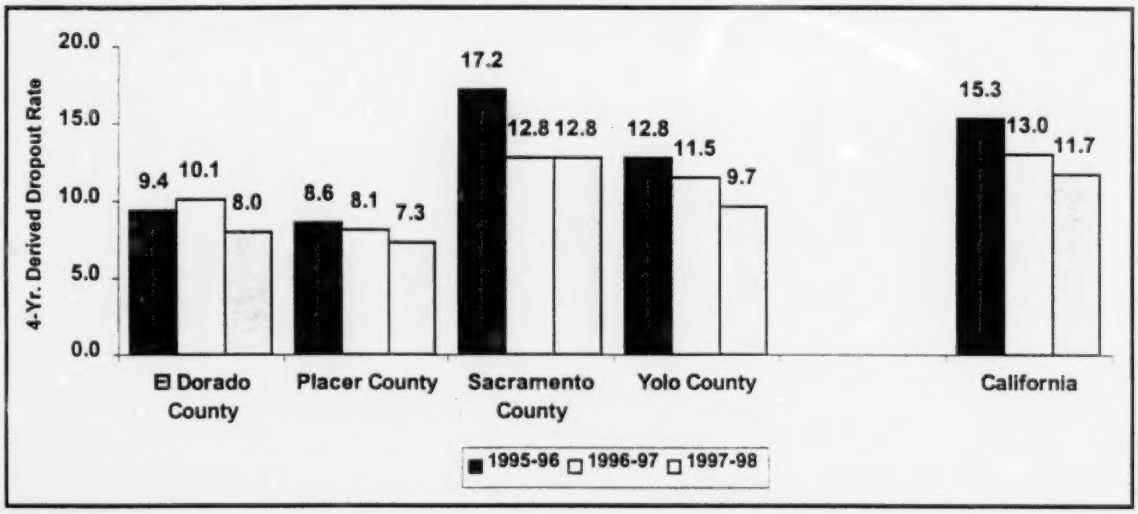
The area's non-white K-12 school population is highly influenced by the students enrolled from Sacramento and Yolo counties. Over half (50.3%) of Sacramento County's K-12 public school population is non-white, while only 34.0% of the total population is. Of Yolo County's K-12 school population, 45.8% is non-white, vs. 33.9% of total population. Sacramento and Yolo counties account for 74.5% of all Greater Sacramento's K-12 school population. El Dorado and Placer counties total population and school-age population are much more similar in their ethnic mix, both with fairly small non-white populations.

Changes in the ethnic mix of school age population are expected to continue. Almost half (47.3%) of the entire CMSA's total population is expected to be non-white by 2040, while 52.7% of Sacramento County's population will be non-white by 2030. Looking at Sacramento County's school age population, over half is non-white right now. Los Rios colleges are likely to see rapidly increasing numbers of ethnically diverse high school graduates enroll over the next several years. But they will also see some more limited growth in the number of white high school graduates enrolling from El Dorado County and more specifically from Placer County where growth is strong and projected to remain strong.

The changes in ethnic composition of Greater Sacramento's population will be even more dramatic for upcoming high school graduating classes over the next forty years. Young college-age students will continue to be far more ethnically diverse, not only than in the past but also as compared to the total population of the area. These changes will create new planning challenges for institutions of higher education in general and for community colleges, more specifically. It is community colleges that have traditionally served much of the growing numbers of ethnic minority students compared to their four-year counterparts.

Academic Performance of School-Age Population

Chart 22
4-Year Derived High School Dropout Rates in Greater Sacramento and California: 1995-96 through 1997-98



Source:
CA Dept. of Ed., CBEDS data, *Annual Dropout Rates for Grades 9 through 12 in California Public School Districts, 1995-96 through 1997-98*, 6/7/99.

By at least one measure, academic achievement of students in Greater Sacramento has, for the most part, improved over the last two years.

El Dorado and Placer counties' schools have lower than average dropout rates. In the most recent year for which data are available, El Dorado County had a low 8.0% dropout rate and Placer County a low 7.3% dropout rate, compared to the state's 11.7%. Yolo County's 9.7% dropout rate is slightly higher but still lower than the state average. Although Sacramento County schools' overall dropout rate is higher at 12.8%, it went from an average 17.2% in 1995-96 down to 12.8% each of the subsequent years.

Academic Performance of School-Age Population

Chart 23
1-Year High School Dropout Rates by Ethnicity in Greater Sacramento and California: 1996-97

	Native American	Asian	Pacific Islander	Filipino	Latino	African American	White	All Students: 1-Year Rate	All Students: 4-Year Derived Rate
El Dorado County	7.3	0.9	n/a	2.2	3.5	n/a	2.3	2.4	10.1
Placer County	2.0	1.1	3.6	n/a	3.9	4.0	1.8	2.0	8.1
Sacramento County	5.4	2.1	3.1	1.6	5.2	4.4	2.7	3.2	12.8
Yolo County	3.7	0.9	n/a	2.9	4.2	4.6	2.2	2.8	11.5
California	4.2	1.7	3.7	1.7	4.8	5.2	2.0	3.3	13.0

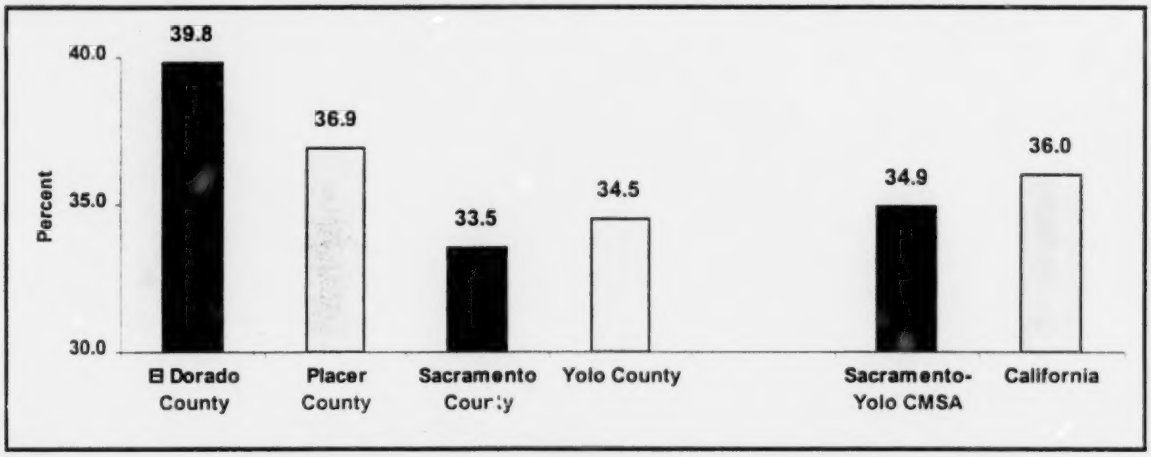
Technical Notes:
n/a indicates that there were no students of this ethnic group who dropped out.

Source:
CA Dept. of Ed., CBEDS data, *Annual Dropout Rates by Ethnicity for Grades 9 through 12 in California Public School Districts, 1996-97*, 4/22/99 Revised data.

Ethnic student groups with slightly higher than average one-year dropout rates were Native American, African American and Latino. Sacramento County's African American students had higher than average one-year dropout rates at 4.4%, but lower than African Americans statewide (5.2%). Sacramento County's Latino student population had a dropout rate of 5.2%, while Yolo County's rate was 4.2%; these compare to a 4.8% dropout rate of Latino students statewide. Sacramento County's Native American students had a 5.4% dropout rate vs. Native American students statewide with a rate of 4.2%; the number of Native American students in Sacramento County schools, however, is fairly small at 43.

Academic Performance of School-Age Population

Chart 24
Proportion of 12th Graders, Class of 1997, Meeting UC/CSU Eligibility Requirements: Greater Sacramento and California

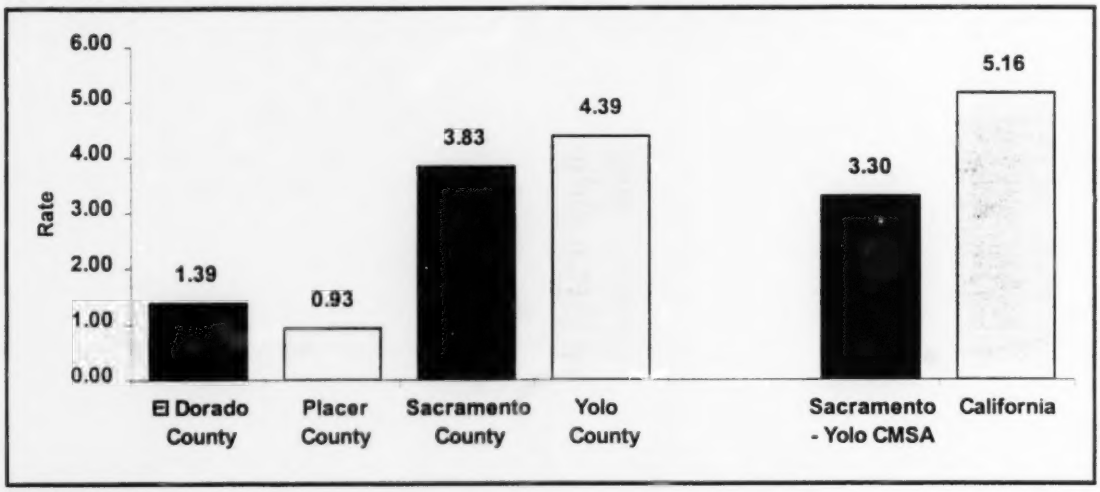


Source:
CA Dept. of Ed., CBEDS data, *Graduates Meeting UC or CSU Entrance Requirements*, October 1997.

On a statewide basis, 36.0% of the 1996-97 graduates met CSU or UC entrance requirements. Only El Dorado County and Placer County students had a higher proportion than the statewide average, at 39.8% and 36.9%, respectively. Only 33.5% of the graduates from Sacramento County were eligible, while 34.5% of Yolo County high school graduates were.

Changing Demography of Special Population Groups

Chart 25
Legal Immigration Rates[1] of Greater Sacramento and California: Federal Fiscal Year 1995



Technical Notes:
1 Legal immigrants as a rate of total population.

Source:
CA Dept. of Finance, *Legal Immigration to CA in Federal Fiscal Year 1995*, January 1997.

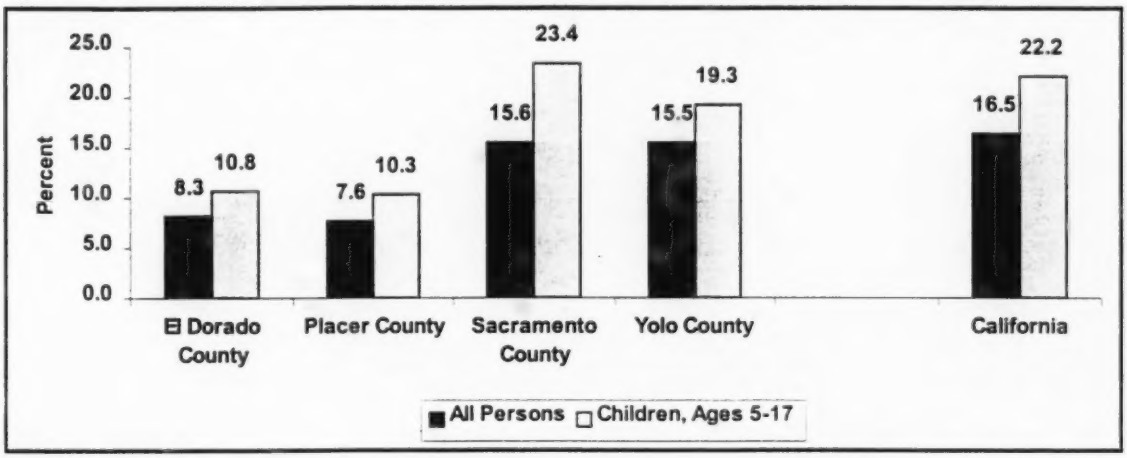
Yolo County leads in Greater Sacramento as the destination of legal immigrants to the U.S. in 1995, with a rate of 4.39. This compares to the state's rate of 5.16.

From 1990 through 1995, Greater Sacramento became the home of 39,882 legal immigrants to the U.S, which is 3.2% of the total legal immigrant population that settled in California during that time period. Of the 39,882, 84.0% moved to Sacramento County. Sacramento County ranks 7th among all California counties for the number of legal immigrants from 1990 through 1995.

Continent of birth of this legal immigrant population is available at the state level for 1995. Of the total legal immigrants to California that year, 53% were from Asia, 28% were from North America, 12% were from Europe and the remaining 7% were from Africa, South America and Oceania. Mexico was the leading country of birth in California with 20% of the total statewide. Other major sending countries include: the Philippines, with 13.7%; Vietnam, with 10.1%; China, with 6.2%; and India, with 4.0%. There were 19.7% fewer legal immigrants that moved to California in 1995 than was the case in 1994. The largest number of legal immigrants who moved to California during this six-year period of study, did so in 1993. There were 33.1% fewer legal immigrants who moved to California in 1995 than the peak number in 1993.

Changing Demography of Special Population Groups

Chart 26
Proportion of the Total Population in Poverty and the Proportion of All Children Ages 5 through 17 in Poverty: 1995



Source:
U.S. Bureau of the Census, *Population in Poverty in the U.S.*

Analysis of the most recently available Bureau of the Census estimates of the number of people in poverty in 1995 shows that the overall poverty levels in each of the four-counties of Greater Sacramento are less than the state average and rates for each have declined slightly since 1993. Dropping by 3.6% from 1993 levels, there was an estimated 225,659 people in poverty throughout Greater Sacramento in 1995. This compares with the 52,212,892 people in poverty in 1995, statewide, a drop of 4.3% from the state's 1993 levels.

But news about the growing number of children in poverty is not good. Chart 26 shows the proportion of all persons who are poor and the proportion of all children ages 5-17 who are poor. There are more children than adults living in poverty, particularly in Sacramento and Yolo counties. Whereas there was a decline in the number of people in poverty in Greater Sacramento in 1995 from the 1993 levels, there was an increase in the number of children ages 5-17, by 12.1%. This is not a statewide phenomenon, where the number of children ages 5-17 in poverty declined by 1.8%.

Of all those who live below the poverty level, a large number are under the age of 18: 43.7% in Greater Sacramento, 42.5% statewide and 39.6% nationwide in 1995. In California, 4.3% of all people living in poverty reside in Greater Sacramento, 4.5% of all those under age 18 who are in poverty live in Greater Sacramento and 4.7% of all those ages 5 through 17 who are in poverty live in Greater Sacramento.

Our Changing Economy and Employment Picture

The Employment Base

Chart 27
Percent of Civilian Employment by Industry in the Sacramento MSA: 1983, 1997 and 1999

Civilian Employment by Industry	1983	1997	1999
Services	22.8	28.2	28.3
Government	33.7	27.3	26.1
Retail Trade	17.7	17.8	17.2
F.I.R.E.	5.1	6.3	7.4
Manufacturing (Durable Goods)	3.4	4.8	4.8
Construction	3.8	4.8	5.6
Transportation & Public Utilities	4.7	4.1	4.0
Wholesale Trade	4.3	3.9	4.0
Manufacturing (Non-Durable Goods)	2.7	2.3	2.1
Farming	1.6	0.5	0.4
Mining	0.2	0.0	0.0
TOTAL	**100.0**	**100.0**	**100.0**

Source:
CA Employment Development Department, Labor Market Division, *Civilian Employment in the Sacramento MSA*, 1983, 1997, 1999.

Government and agriculture have been the major components of Greater Sacramento's economic base until recent years, when a more diversified economy began to evolve. Since the early 1980s, changes in the proportions employed by various industries, with the exception of Services, have been incrementally small.

The Changing Employment Base

Chart 28
16- and 2-Year Rate of Change in Employment by Industry in the Sacramento MSA: 1999

Civilian Employment by Industry	16-Year Percent Change: 1983 to 1999	2-Year Percent Change: 1997 to 1999
Services	70.1	6.9
Government	6.8	2.4
Retail Trade	33.8	3.6
F.I.R.E.	98.4	25.6
Manufacturing (Durable Goods)	95.6	6.1
Construction	103.9	24.1
Transportation & Public Utilities	17.9	4.8
Wholesale Trade	29.9	9.5
Manufacturing (Non-Durable Goods)	6.9	0.0
Farming	-67.5	-10.7
Mining	-75.0	0.0
TOTAL	**37.6**	**6.8**

Source:
CA Employment Development Department, Labor Market Division, *Civilian Employment in the Sacramento MSA*, 1983, 1997, 1999.

Although the proportions of total employment by industry have not changed dramatically since 1983 (primarily because all major sectors have experienced proportional growth), several industries have shown a rapid rate of growth. The most significant employment growth in the Sacramento MSA has taken place in the manufacturing of durable goods, construction, the finance, insurance and real estate industry (F.I.R.E.), and services (including hotel, personal, business, health, auto, amusements and social services, with health services dominating the growth). The manufacturing of electronics equipment which was non-existent in 1983, now accounts for 29% of the durable goods manufactured in the Sacramento MSA in 1999, up from 26% two years ago.

An Overview of Recent Employment Growth in Greater Sacramento

According to California Employment Development Department analysis of labor market data over the last year, the number of jobs in Sacramento MSA grew by 16,500. Nearly one of every two jobs was in the services industry. Growth was also strong in the construction industry (by 2,900 jobs), finance, insurance and real estate industry (by 2,200 jobs) and in government (by 1,800 jobs). Retail trade and the transportation and public utilities industries also grew (by 1,000 jobs, each), while wholesale trade grew by 900 jobs. Manufacturing employment dropped by 1,400 jobs resulting from the decline in computer equipment production. Small gains in employment were experienced by several of the other durable goods industries.

Greater Sacramento's largest employers are currently as follows: the state of California, excluding education (73,600 employees), University of California at Davis (15,240), Sacramento County (11,000), McClellan Air Force Base (8,700), Sutter Health (6,590), Raley's (6,430), Mercy Healthcare Sacramento (5,720), Pacific Bell (5,660), Hewlett-Packard (5,400), UC Davis Medical Center (5,180), Intel (5,000), U.S. Postal Service (4,860), and Kaiser Permanente (4,800). (from the *Sacramento Business Journal*, "Top 25 Individual Companies")

Over three-fourths of Greater Sacramento's employment is in Sacramento County (77.4%), while Yolo County accounts for 9.8%, Placer County for 9.1% and El Dorado County accounts for 3.7%.

At the county level, Placer (excluding the Tahoe Basin) led the way in the Sacramento-Yolo CMSA with 59.5% growth in employment from 1990 through 1997, followed by Yolo County at 29.8% growth. El Dorado County (excluding the City of South Lake Tahoe and the Tahoe Basin) employment grew by 28.0%, while Sacramento County's employment grew by 10.3%.

Placer County's employment growth was high in all major cities, at 41.6% or more. The city of Lincoln led the way at 125.0% employment growth, followed by Auburn (70.7%) and Rocklin (68.1%); employment growth in unincorporated areas was 81.7%. El Dorado County's growth took place primarily in its unincorporated areas (34.0%), while Placerville's employment grew by 14.2%.

Yolo County's growth occurred because of large employment gains (78.5%) in West Sacramento, followed by Woodland (16.3%) and Winters (10.4%). The city of Folsom was the only city in Sacramento County to see major employment growth (56.9%) over this eight-year period; growth in Galt was at 12.7% and in unincorporated areas it was 13.3%.

Employment Base of the Future

New projections by the Sacramento Area Council of Governments (SACOG) suggest that employment growth will be much stronger than was expected two years ago (moving from a 1995 to a 1997 base). Over the next eight years (from 1997 through 2005), employment in the four-county area of Greater Sacramento is expected to grow by 45.8%. Placer County is expected to lead with 151.5% growth, followed by Yolo County with 69.9%, El Dorado County with 66.7% and Sacramento County with 29.3%.

By 2005 Sacramento County is projected to account for slightly less of the total CMSA employment than is presently the case, dropping from 77.4% (1997) to 68.7% of total employment in 2005. The proportion of total CMSA employment in the remaining three counties is expected to change as follows: Placer County, where employment is expected to grow from a 1997 level of 9.1% to 15.7% by 2005; Yolo County, from 9.8% to 11.4%; and El Dorado County where there will be modest gains in the proportion of total employment from 3.7% to 4.2%.

The California Employment Development Department (EDD) outlines which specific industries will experience the projected employment by 2005 in its Labor Market Information reports. In Sacramento County employment gains are expected across all major industries but the county's largest industry, the services industry, is expected to gain the largest number of jobs, where two areas stand out as particularly strong. The first is business services, specifically in computer programming, data processing and other computer-related jobs. The second is in health services, as Sacramento County grows in its role as the leading center for regional health, serving a population that is both expanding and aging. Other services expected to see expanding employment include engineering, accounting, research and management services.

The fastest rate of expansion, however, is expected in the manufacturing industries, followed by the construction industries. Most of the expansion in manufacturing will be in the high-tech segments of electronics, semi-conductors, computers and communications equipment, followed by employment growth in transportation equipment, medical equipment and other durable and non-durable goods products. Economic expansion and population growth will impact employment growth in the entire construction industry.

All other segments will see growth, though more limited: retail trade (eating and drinking establishments, food and drug stores and big box retailers, particularly in the fast growing communities of the county); finance, insurance and real estate (back office operations, call centers and data processing services for finance and insurance sectors as well as the real estate market); wholesale trade; and transportation, communications and public utilities (also largely due to growth of back office operations and expansion of telecommunications call centers, and expanding trucking and warehousing operations due to increasing volumes of freight). Government sector employment will expand much more modestly, despite the closure of McClellan Air Force Base.

Our Changing Workforce Skill Requirements

The economies of California and Greater Sacramento, as well, have become diverse, knowledge-based, mobile and increasingly global. Paramount to continued success in such an arena is a well-prepared and educated workforce. Employee skills must closely match work place requirements in an economy that is extremely competitive and rapidly changing. This will require the education of a workforce over, and over and over again, as skill requirements change on an on-going basis.

Educational futurists are writing extensively on the changing nature of work. We can expect to see the continuation of *major* changes within organizations and in the way we do work – organizations that are moving from rigid bureaucracies to more fluid and flexible structures, where barriers between the organization and the community which it serves dissolve; a move from workers with narrowly defined positions to mobile knowledge workers serving on project teams meeting multiple and often simultaneous task completion deadlines; and a shift away from placing greater value upon the physical assets of an organization over the intellectual assets.

These workforce and organizational changes will require a great deal of complimentary change in the way educational institutions do business. Patterns of learning are changing – from a distinction between work *or* learning to a fusion between work *and* learning. Time that workers will have to dedicate exclusively to upgrading skills will be short and often inflexible. "Just-in-time" competency-based learning will be required from educational institutions. Colleges and universities will move from being exclusive providers of education to learning facilitators and developers.

One report after another issued over the last four years on the economy of California has outlined the critical importance of education in building and sustaining the economy. In 1996 business and civic leaders of the California Economic Strategy Panel evaluated education and workforce training as *the top priority* for the economic success of California, as did may subsequent reports by other major think tanks studying the economy of California. The 1999-2000 Governor's budget was framed on the premise that the economic future of the state is tied irrevocably to the future of education, suggesting that business leaders statewide have indicated that education and infrastructure must be the Golden State's highest priorities. Schools, colleges and universities have been challenged to link with California's businesses and industries to boost education workforce training. There is a strong need for educational gains in: computer competence and utilization of rapidly changing technologies by employees; ability of employees to work together in groups; self-confidence enabling employees to more easily respond to change; and improved literacy, math skills, and creativity to compete in the changing work place.

Los Rios staff and consultants saw similar concerns raised by local business leaders during organized focus group meetings related to the 1997 Strategic Planning process. Greater Sacramento employers seek: employees with *basic* skills (computer literacy and communication skills); employees who are flexible enough to adapt to an ever-changing work environment; and employees capable of working effectively in teams. With these basic skills developed through college and university education, employers will build upon them with more specialized training.

The Changing Political Scene

Public Perception

Public perception of Los Rios colleges was most recently identified through the 1997 Strategic Planning process when representatives of the community were interviewed through affinity/focus group sessions that involved a broad range of community and business representatives. Several key issues of concern identified by the representatives include the following:

- Addressing educational challenges resulting from welfare reform;
- Developing an identity as a networked system of colleges rather than as individual colleges;
- Promoting better awareness of the colleges' comprehensive, low-cost and high quality offerings;
- Providing effective support services for students, while encouraging their independence;
- Breaking down "disciplinary silos" to emphasize team approaches for enhancing core skills and critical thinking by students;
- Strengthening community college networking statewide to enhance policy changes that support community colleges; and
- Exploring ways to share resources across the district, as well as across community institutions and organizations.

Echoing the idea of building relationships with the broader community, educational partners want to see the district focus on building a ladder of educational services with high organizational connectivity as well as models for sharing resources between institutions. Educational partners called for an educational consortium that links Los Rios, 4-year institutions of higher education, K-12 schools, businesses and local government.

National and State Level Factors

The recent focus at the federal level has been set by four themes: helping low income students prepare for and succeed in college; making college more affordable through increasing appropriations in student loan, grant, work study and the Hope Scholarship programs; and making education at all levels more accountable, with major emphasis on K-12 under reauthorization of the Elementary and Secondary Education Act.

At the state level, stable economic growth has continued the better budget prospects enjoyed by community colleges and the public universities of California over the last few years and in fact, the critical relationship between education and the economy serves as the underpinning of major public policy decisions. The 1999-2000 Governor's Budget Summary points out that the economic future of California is tied *irrevocably* to the future of education and is one of the highest priorities of business leaders statewide. Similarly, at the local level, there is a call for schools, universities and colleges to be linked with business and industry so each assists the other to educate Californians for sustained economic growth was made. Likewise, governors across the country have prioritized education, and more specifically, higher education as a key to economic growth, according to the Education Commission of the States. As such, many governors nationwide have proposed initiatives requiring accountability and responsibility from all engaged in preparing youth for tomorrow's work world.

Issues Related to Accountability

Accountability to the public remains a major concern at both the state and national levels. Colleges and universities are being asked to verify that students are, indeed, learning, and that they are adequately prepared for the careers they choose to pursue. Federal Student-Right-to-Know legislation requires all public colleges and universities to make data on student completion rates available to the public in the year 2000, beginning with a report on the 1995 first-time student cohort. California Assembly Bill 1725 requires that the Board of Governors of the California Community Colleges provide accountability data about community colleges before state and federal legislative and executive agencies.

In the wake of great discussions about performance-based funding both nationally and across the state over the last few years, a unique initiative was promoted by the Chancellor's Office of California Community Colleges called the *Partnership for Excellence*. Outlined in Education Code section 84754, the *Partnership for Excellence* requires the Community College Chancellor's Office to report to the Legislature, Governor and other interested parties on the level of achievement and progress made by the 107 community colleges on five major goals. These goals include: increasing the number of students who transfer from community colleges to the CSU and the UC; increasing the number of degrees and certificates awarded to students; improve the rate of successful course completion; improving the rate by which students enrolled in basic skills improvement courses complete subsequent levels of coursework; and increasing the impact that community colleges have on workforce development through vocational education, as well as contract education for California businesses and their employees. During 1998-99, $100 million was provided to the *Partnership for Excellence* in the State Budget. The Governor's proposed State Budget for 1999-00, however, includes only $10 million more for the *Partnership*. It is hoped that budget revisions will provide for increased funding for the *Partnership* in order that colleges have adequate funding to impact improvement across these five major goals.

Another major state initiative in the performance-based accountability system is Senate Bill 645, which became law on January 12, 1996. SB 645 has given the State Job Training Coordinating Council (SJTCC) the responsibility of designing and implementing a system to evaluate the performance of all publicly-funded workforce preparation programs in the State by January 1, 2001, including those initiated by the community college system. It requires the development of an accountability system that includes measures that are objective indicators of the achievement of workforce preparation system goals, measures that establish the minimum acceptable achievement of goals/objectives/thresholds for excellence and a continuous improvement process that incorporates incentives and sanctions. A system-wide Task Force for community colleges has been defining a performance reporting system for the 107 community colleges that relies heavily upon matched data from the California Employment Development Division (EDD). Known as the UI Wage Data Report, this system is designed to verify salary and wage information of former community college vocational education students.

These forces are driving the research agendas of *many* community colleges, particularly in California. Not only has accountability been a focal point of concern on the national agenda, beginning early in 1998, it has become a major focus at the state level, as well.

Issues Related to Organizational Structure of California Community Colleges

Since 1995, several reports related to higher education policy have been written on the impending impact of "Tidal Wave II" upon higher education in California, generally and upon the three public systems more specifically. Early reports urged the state to begin planning immediately to deal with the influx of these growing cohorts of students. With a physical infrastructure that is inadequate for serving such large numbers seeking higher education, policymakers are being urged to move quickly, before it is too late. A newer series of related reports have been issued since 1997, moving beyond the recommendations to build more and larger campuses to possible ways of streamlining the systems. As such, issues related to governance and organizational structure have immerged. Three state level reports suggested interesting changes for California community colleges.

The first report was one of the last major publication issued by the California Higher Education Policy Center, a think tank founded in the early 1990s. Published in Spring 1997, this publication is called *State Structures for Higher Education Governance: A Comparative Study in Seven States*. The publication was based upon in depth review and comparative analysis of the public higher education systems of each state. Many interviews were conducted with key stakeholders across the systems and throughout the business, industry and government sectors, as well. Findings of the study suggest that although California community colleges received positive assessments on performance issues, problems existed in the governance structure. Suggesting that California community colleges were actually a federation rather than a system. Concerns were raised about coordination and governance by the State Chancellor's Office, as well as collective bargaining agreements that require fund allocation at the expense of operation, maintenance and technology at the local level.

The California Citizens Commission on Higher Education issued a similar and much stronger report. Established in 1996, members of this commission believed that California lacked a long-term realistic plan to enroll the surge of new students projected to seek college admission. Public hearings were held throughout the state and preliminary and final reports were issued. Among the recommendations for the two university systems were several for community colleges. Major recommendations this report were to stabilize funding, reduce state regulation, improve accountability and simplify the organizational structure. This translated to changing the three-tiered system of a state chancellor's office, districts and colleges to a two-tiered system, eliminating districts.

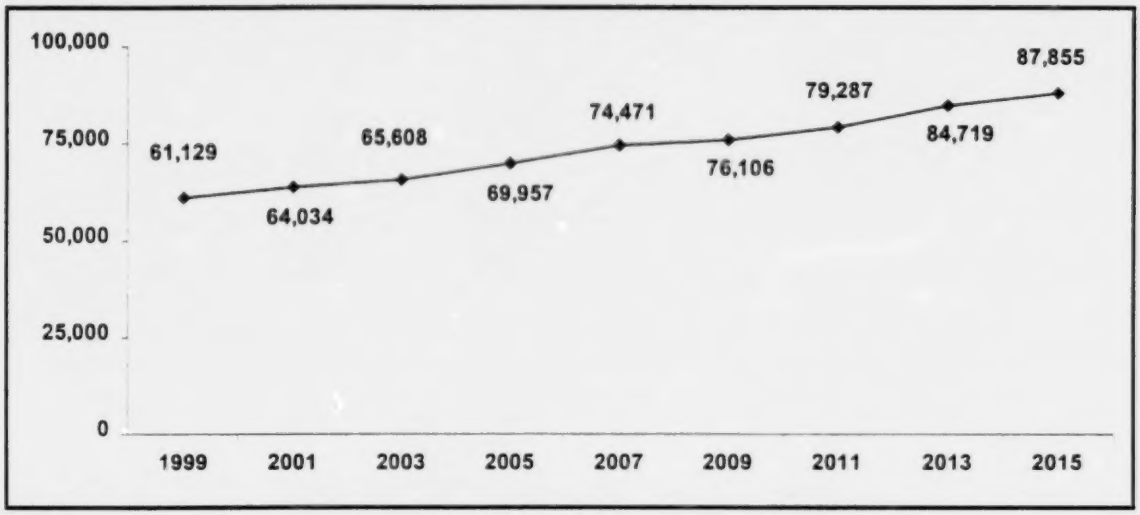
The California Postsecondary Education Commission (CPEC) issued the final report that made recommendations about the organizational structure and governance of California community colleges this year. Issued in December 1998, CPEC's report on community college governance recommends: legislation declaring the Board of Governors to be the statewide governing board, as an education entity rather than a state agency, to assure the creation of a single integrated higher education system; that shared governance be replaced with the concept of cooperative governance, with final decisions to be made by the Board of Governors after soliciting advice and comment from key constituent groups. CPEC's report did not recommend the elimination of districts and their boards of trustees, suggesting that the current structure facilitates regional collaboration with business and industry as well as with other education providers. Instead, it was recommended that district boards of trustees be delegated a specific set of responsibilities and the authority to act on behalf of the Board of Governors, as well as a fiduciary responsibility to it.

If legislation is enacted in response to these reports, there will be a major structural change at the local level.

Projected Changes for Los Rios Community College District

Historical figures reported to the CA Community College State Chancellor's Office suggest that since 1980, full-term fall semester enrollment in Los Rios colleges has increased by 36.9%, from 44,479 to 60,801 by Fall 1998. Growth is projected to continue well into the 21st century.

Chart 30
Projected Enrollment for the Los Rios Community College District to the Year 2015



Source:
Research and Analysis Unit of the Chancellor's Office of the California Community Colleges, *LRCCD Enrollment Projections*, 1998.

Chart 30 displays enrollment projections, generated by the California Community College Chancellor's Office (CC-CO) staff, the projections that are being used this year by the District. CC-CO projections are generated using an econometric model that factors in costs facing students, college budget expenditures, population, unemployment and financial constraints (pre- and post-Proposition 13).

LRCCD also generates projections that are based on population participation rates calculated using current aggregate county level population estimates and population projection data for the four-county area served by the District, assuming the current participation rate of 3.3% of total population and 7.3% of adult population will remain constant. This approach is used by the District because analysis of historical data actually shows that participation rates have remained relatively stable (an average 7.7% of the adult population) over this 16 year period when aggregate CMSA data and LRCCD enrollment data are used; moreover, participation rates have fluctuated by approximately 1% or less during this same time period. However, since the District's own projections were so close to those generated by the CC-CO, management chose to use the latter.

Chart 31
Projected Enrollment by College and Center: 1999 through 2004

	Actual	Projected: 1999-2004					
	1998	**1999**	**2000**	**2001**	**2002**	**2003**	**2004**
American River College	**27,166**	24,146	24,600	24,653	23,858	23,619	23,870
Cosumnes River College	**9,332**	10,209	10,570	10,758	10,897	11,219	11,665
Sacramento City College	**18,803**	20,356	20,511	20,555	20,505	20,535	20,903
Folsom Lake[1]	**3,342**	3,851	4,593	5,379	6,448	7,414	8,091
El Dorado Center	**2,902**	2,567	2,642	2,689	2,773	2,821	2,899
LRCCD[2]	**59,436**	61,129	62,916	64,034	64,482	65,608	67,428

Technical Notes:
Data for 1998 reflect *actual* end of semester enrollment (LRCCD Research Database) rather than projected enrollment.
1 Folsom Lake Center until 2002-2003, at which time it becomes Folsom Lake College.
2 LRCCD Enrollment in Fall 1998 is unduplicate enrollment across the colleges; projected enrollment is duplicate across the colleges.

Source:
LRCCD End of Semester Research Database; CA Community Colleges Chancellor's Office.

Chart 31 reflects actual End of Semester enrollment for Fall 1998 and projections for the district in 1999 through 2003. College and center proportions of the Chancellor's Office projections for the district were estimated using Fall 1993 through Fall 1998 actual End of Semester proportions, anticipated growth at Folsom Lake College with the completion of Phase I-A in 2000 and Phase I-B in 2003 and the projected shifts in population across Greater Sacramento for the primary service areas of each college and the two centers. Projections are also based upon the assumption that anticipated facilities construction scheduled to occur at ARC and SCC during this time period will have little impact upon generating new enrollments (as outlined by LRCCD Facilities Management staff).

Much of the new enrollment projected through the year 2004 and beyond is likely to come from the communities projected to have the highest levels of population growth. These communities include: El Dorado Hills, Folsom, Franklin-Laguna, Galt, Elk Grove, Granite Bay, Antelope, Davis, Cameron Park/Shingle Springs, South Sacramento, North Natomas, South Natomas and West Sacramento.

As mentioned in the first section of this report, as Folsom Center expands to become a college it will be in a good position to absorb the growth in students from Folsom, El Dorado Hills, Cameron Park - Shingle Springs and Granite Bay. As such, it will be in a position to more effectively serve not only Folsom but also the County of El Dorado which to date is not being served by any full-service college in close proximity.

American River College is likely to see strong enrollment growth from the Natomas areas of Sacramento as well as enrollment growth from Antelope. Sacramento City College is likely to see enrollment growth from Davis, West Sacramento and South Sacramento. And Cosumnes River College is likely to see continued enrollment growth from Franklin-Laguna, Elk Grove and Galt.

Summary Observations of External Scan

Greater Sacramento Economy

- Long-term employment growth over the last 15-year period has been strong across all sectors except farming, mining and government. Rapid growth has occurred over the last two years (1997 to 1999) in the construction industry and the F.I.R.E. industries (finance, insurance and real estate), in particular. Over this same two-year period, services, durable goods manufacturing and whole sale trade have also seen strong growth.

- Labor market projections to the year 2005 suggest employment gains across all major industries for Greater Sacramento in general and for Sacramento County in particular. The service industry is expected to gain the largest number of jobs, particularly for the computer-related and health-related sectors. Other high growth employment opportunities are expected in engineering, accounting and research and management services, all fields requiring an educated workforce.

- A fast rate of expansion is also expected in the manufacturing industries, followed by the construction industries. Most of the employment expansion in manufacturing will be in the high-tech segments of electronics, semiconductors, computers and communications equipment, followed by employment growth in transportation equipment, medical equipment and other durable and non-durable goods products.

- As this diverse, knowledge-based economy of the region continues to rapidly evolve, it requires workers who must begin their careers with more education than in the past. Moreover, because of the rapid economic changes, this workforce must be provided the opportunity to continually upgrade their education over and over, as skill requirements change on an on-going basis.

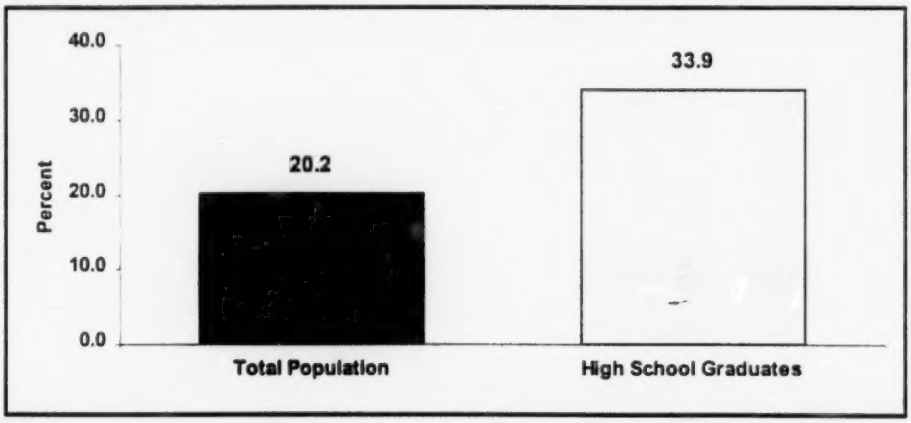
- As such, Los Rios colleges will play a larger role in preparing area residents for work than in the past, if the economy is going to sustain the level of change that is projected to occur.

Greater Sacramento Population Shifts

- Greater Sacramento's 1999 population of 1.71 million has grown by 53% since 1981 and is projected to grow by an additional 20%, to 2.05 million by 2007.

- While total population in the Greater Sacramento CMSA is projected to increase slightly more than 20%, the number of high school graduates are projected to increase by almost 34%. Because of this, Los Rios colleges can expect a continuation of the current shift toward an increasing number of younger students.

Chart 32
Projected Increase in Total Population and High School Graduates in Greater Sacramento by 2008

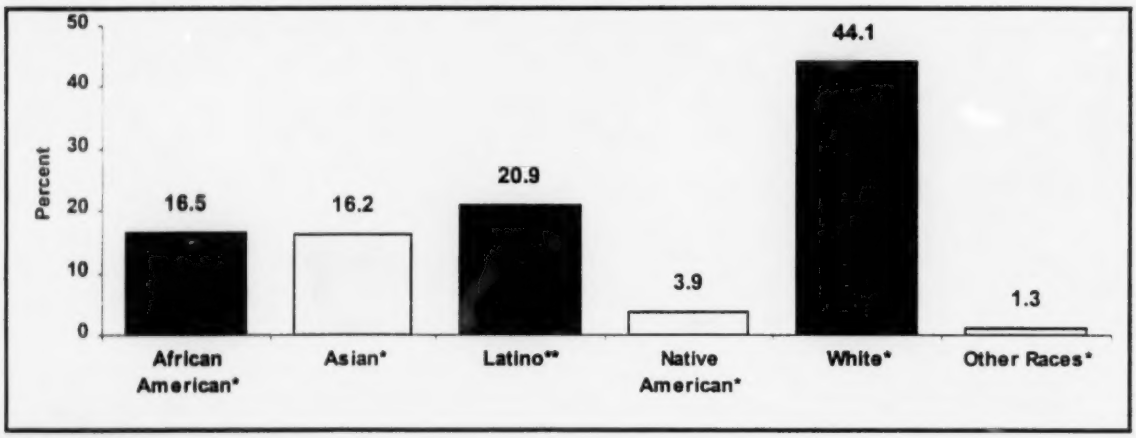


Source:
SACOG, *Population* and *Population Projections*; CA Dept. of Ed. CBEDS *High School Graduates* and *Projected High School Graduates*.

- The rapid growth in high school graduates has already begun. Annual growth in high school graduates of the Greater Sacramento Area schools was rather flat (2.2% or less, 1993 through 1996) until the graduating classes of '97 and '98, when growth was 9.6% and 7.4%, respectively.

- As the population grows, it is becoming more ethnically diverse. Greater Sacramento's ethnic minority population made up 26.8% of the total population in 1990. By 1996 it grew to 29.3%. In Sacramento County these figures were 30.7% and 34.0%, respectively. More recent data for the city of Sacramento suggests that the city's ethnic composition is evolving even more rapidly than expected. The city of Sacramento was one of three sites across the country that served as an U.S. Census 2000 "Dress Rehearsal" location in April 1998. From this it was learned that more than half of the city's population is ethnic minority, as shown in the following chart.

Chart 33
Proportions of the City of Sacramento Population by Ethnicity: April 1998

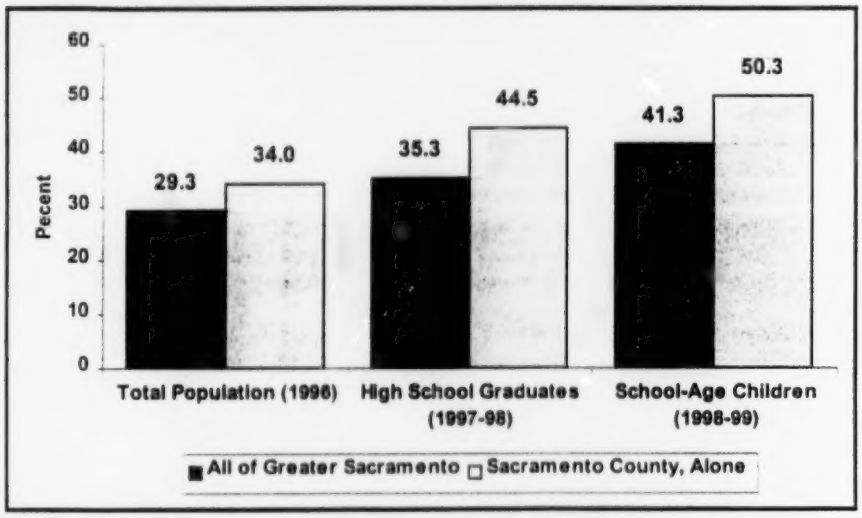


Technical Notes:
* This race and mixed race thereof.
** This category overlaps others.

Sources:
U.S. Bureau of the Census, *Dress Rehearsal: Census 2000* data.

- School age and high school graduate populations currently in the educational pipeline on their way to Los Rios colleges are where ethnic diversity is most pronounced. In 1996, ethnic minorities made up 29.3% of the four-county Sacramento area population, but ethnic minorities made up 35.3% of 1997-98 high school graduates and 40.6% of the 1997-98 total school-age population, as displayed in Chart 3 below. These proportions are even higher for Sacramento County, home of 62.0% of Greater Sacramento's high school graduates and 66.2% of its student population in 1997-98. Chart 3 shows that Sacramento County's 44.5% of high school graduates and 49.4% of school-age population were ethnic minorities in 1997-98. Yolo County has relatively high proportions of ethnic minority graduates and students, as well: 39.3% of graduates and 45.2% of all school-aged children in 1997-98.

Chart 34
Non-White Population as a Proportion of Total Population in Greater Sacramento



Sources:
Department of Finance, *Race/Ethnicity Population Estimates, 7/90-7/96*, January, 1998; CA Dept. of Ed. CBEDS, *1998 High School Graduate Demographic Data Files*, June 1999; and CA Dept. of Ed CBEDS data, *1998-99 CA Public K-12 Enrollment by Ethnicity*, August 1999.

- An alarming proportion of the school-age population of Greater Sacramento is at or below the poverty level. Although the number of people in poverty in Greater Sacramento dropped by 3.6% from 1993 to 1995, the number of children ages 5-17 in poverty increased by 12.1%. This is not a statewide phenomenon where the number of children ages 5-17 in poverty declined by 1.8%.

- As such, in the foreseeable future, Los Rios colleges are likely to be enrolling a growing number of new, young students who are ethnic minorities, particularly those in Sacramento and Yolo counties. Some of these new students may also be either economically disadvantaged or educationally disadvantaged, and many may be both. Students who are new high school graduates will continue to be much more ethnically diverse each year. And finally, the numbers in each graduating cohort will be increasingly larger.

Sources of Data and Information:

U.S. Bureau of the Census; CA Department of Finance; Sacramento Area Council of Governments; CA Department of Education; LRCCD Office of Institutional Research database; California Postsecondary Education Commission; California Community College's Chancellor's Office; American Association of Community Colleges; CA Employment Development Department (EDD); CA EDD Labor Market Division; Federal Reserve Bank of San Francisco; Sacramento Business Journal.

This report was written by: Judith Beachler, Director, Los Rios Community College District Office of Institutional Research.

For further information please call: 916-568-3131, LRCCD Office of Institutional Research.

All district research reports are available on the IR Web Site at – http://irweb.do.losrios.cc.ca.us